

# **Global CD-SEM Metrology Systems Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032**

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## **Abstracts**

According to our (Global Info Research) latest study, the global CD-SEM Metrology Systems market size was valued at US\$ 301 million in 2025 and is forecast to a readjusted size of US\$ 563 million by 2032 with a CAGR of 9.1% during review period.

In 2025, global CD-SEM Metrology Systems capacity 500 Units, sales reached approximately 431 Units, with an average market price of around 680 k USD/Unit, industrial gross margin 43%.

CD-SEM Metrology Systems function as the electron-beam dimensional reference layer in lithography and etch process control, with value concentrated in repeatable, low-damage, production-grade metrology rather than standalone imaging. A CD-SEM scans patterned wafers or photomasks with an electron beam and extracts critical dimensions, pitch, contact-hole size, line-edge roughness, line-width roughness, edge-placement error, overlay-related metrics and localized profile signals. In production, CD-SEM Metrology Systems are deployed after lithography develop, after etch, after clean and inside mask manufacturing flows. Unlike general-purpose SEM tools, CD-SEM Metrology Systems are built around automatic wafer or mask handling, recipe control, statistical sampling, fleet matching, inline process control and data connectivity to fab-level APC and yield systems.

The competitive axis of CD-SEM Metrology Systems has shifted from image quality alone to precision, speed, damage control and closed-loop usability. Typical production tools compete on sub-nanometer e-beam resolution, low landing energy, rapid multi-point wafer sampling, automated field-of-view switching, 6/8/12-inch wafer support, EPE measurement, CD/roughness extraction, overlay-related metrology and high-aspect-

ratio signal capture. Practical calibration and use cases commonly involve magnification bands around 20k-200k, while high-voltage CD-SEM variants can reach 60kV acceleration voltage for deeper structures and stronger signal access. For advanced logic, DRAM, 3D NAND and compound semiconductors, the real qualification gate is not a headline resolution figure; it is repeatability, tool-to-tool matching, charging mitigation, recipe portability, throughput, automation stability and integration into process-control software.

The CD-SEM Metrology Systems value chain is structurally concentrated because production readiness depends on system-level integration across electron optics, motion, vacuum, algorithms and fab automation. Upstream components include electron guns, columns, detectors, vacuum chambers, vibration isolation, precision stages, wafer or reticle handlers, low-noise power supplies and image-processing software. Midstream platforms include wafer CD-SEM, photomask CD-SEM, high-voltage CD-SEM, compound-semiconductor CD-SEM and compact R&D-oriented systems. Downstream users include wafer fabs, mask shops, advanced packaging lines, compound-semiconductor manufacturers and R&D pilot lines. Vendor positioning is segmented: wafer-fab CD-SEM remains led by established Japanese and U.S. platforms, photomask CD-SEM is dominated by specialized Japanese suppliers, and Chinese entrants are advancing through 12-inch wafer tools, e-beam inspection and yield-management software bundles. A relevant transaction pattern is the consolidation of photomask CD-SEM capability: A&D's integration with Holon through equity control and a 2022 share exchange was followed by new mask CD-SEM product releases and dedicated capacity expansion, indicating that the segment is moving from tool shipment competition toward integrated R&D, manufacturing and field-service capability.

Recent industry catalysts for CD-SEM Metrology Systems are concentrated in EUV/High-NA EUV, advanced masks, domestic substitution and metrology standardization. Since 2023, wafer CD-SEM platforms for EUV and High-NA EUV have emphasized lower resist damage, higher resolution and faster scans; in 2025, new mask CD-SEM systems targeted 2nm-and-beyond and 1.6nm-node-and-beyond mask requirements; in China, the market is moving from first shipment and pilot validation toward customer-line qualification, repeat orders and software-linked yield control. The structural trends are clear: CD-SEM is expanding from CD-only measurement into EPE, LER/LWR, overlay, HAR structures and multi-parameter morphology extraction; algorithms are moving from edge detection to AI-assisted recipe generation, automatic classification and cross-fleet matching; hybrid metrology is turning CD-SEM Metrology Systems into the high-accuracy anchor for optical and computational metrology; and incremental demand is emerging from advanced packaging, SiC/GaN, mature-node

localization and domestic mask ecosystems. Procurement logic is also changing from tool price to lifecycle cost of ownership, uptime, consumables, application support and local service density.

This report is a detailed and comprehensive analysis for global CD-SEM Metrology Systems market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

#### Key Features:

Global CD-SEM Metrology Systems market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global CD-SEM Metrology Systems market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global CD-SEM Metrology Systems market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global CD-SEM Metrology Systems market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

#### The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for CD-SEM Metrology Systems

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global CD-SEM Metrology Systems market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Hitachi, Applied Materials, Advantest, Holon, TCK, Dongfang Jingyuan Electron, Shanghai Precision Measurement Semiconductor Technology, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

### Market Segmentation

CD-SEM Metrology Systems market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

#### Market segment by Type

High Resolution

Low Resolution

#### Market segment by Installation

Standalone Metrology

Hybrid Metrology

#### Market segment by Process

Lithography Process

Etch Process

#### Market segment by Application

6 Inches Wafer

8 Inches Wafer

12 Inches Wafer

Major players covered

Hitachi

Applied Materials

Advantest

Holon

TCK

Dongfang Jingyuan Electron

Shanghai Precision Measurement Semiconductor Technology

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe CD-SEM Metrology Systems product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of CD-SEM Metrology Systems, with price, sales quantity, revenue, and global market share of CD-SEM Metrology Systems from 2021 to 2026.

Chapter 3, the CD-SEM Metrology Systems competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the CD-SEM Metrology Systems breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and CD-SEM Metrology Systems market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of CD-SEM Metrology Systems.

Chapter 14 and 15, to describe CD-SEM Metrology Systems sales channel, distributors, customers, research findings and conclusion.

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